

OC LC response: Discovery Provider Conformance Checklist

For Market Product WorldCat Discovery

Y/N/P	Recommendation	Reference	Comment
Y	Discovery Service provides collection level content listing for library customers.	3.3.1.1	Detailed list of central index collections available at oc.lc/discoveryindex
Y	Provider	3.3.1.1	Detailed list of central index collections available at oc.lc/discoveryindex
Y	Market product	3.3.1.1	Detailed list of central index collections available at oc.lc/discoveryindex
Y	Titles in KB	3.3.1.1	View list of WorldCat knowledge base collections
Y	Titles in Central Index	3.3.1.1	Will provide upon request submitted to support@oclc.org .
N	Number of unique records in Central Index	3.3.1.1	Total number of records displays on WorldCat Discovery website .
Y	Percent of records full-text searchable in Central Index	3.3.1.1	Will provide upon request submitted to support@oclc.org .
P	Percent of records abstract searchable in Central Index	3.3.1.1	Available at the collection level via request submitted to support@oclc.org .
P	Percent of records subject searchable in Central Index	3.3.1.1	Available at the collection level via request submitted to support@oclc.org .
Y	Percent of articles that are free to read	3.3.1.1	Service surfaces articles when needed metadata is available. Percentages will be provided upon request submitted to support@oclc.org .

Y	Date of last market product update	3.3.1.1	Available upon request. Dates vary by content provider. A dated list of central index collections is provided at oclc.org/discoveryindex .
Y	Date of last report update	3.3.1.1	Central index list at oclc.org/discoveryindex is dated.
	Discovery Service provides title-level content listing for library customers.	3.3.1.2	
Y	Title	3.3.1.2	A list of collections in the WorldCat knowledge base is available on the OCLC website . Consult content providers title-level details about individual collections.
Y	Standard identifier	3.3.1.2	A list of collections in the WorldCat knowledge base is available on the OCLC website . Consult content providers title-level details about individual collections.
Y	Content format	3.3.1.2	A list of collections in the WorldCat knowledge base is available on the OCLC website . Consult content providers title-level details about individual collections.
Y	Content type	3.3.1.2	A list of collections in the WorldCat knowledge base is available on the OCLC website . Consult content providers title-level details about individual collections.
Y	Dates of coverage or date of publication	3.3.1.2	A list of collections in the WorldCat knowledge base is available on the OCLC website . Consult content providers title-level details about individual collections.
Y	Number of records in Central Index	3.3.1.2	
Y	Percent of records full-text searchable in Central Index	3.3.1.2	Available upon request submitted to support@oclc.org
Y	Percent of records abstract searchable in Central Index	3.3.1.2	Available upon request submitted to support@oclc.org

Y	Percent of records subject searchable in Central Index	3.3.1.2	Available upon request submitted to support@oclc.org
N	Percent of articles that are free to read	3.3.1.2	View list of 100% free-to-read collections.
N	Date of last report update	3.3.1.2	
	Distribution of metadata elements	3.3.1.3	
Y	Provide data in downloadable form	3.3.1.3 (1)	
Y	Provide data in tab-delimited text files	3.3.1.3 (2)	
N	Use ProviderName_YYYY-MM-DD.csv naming convention	3.3.1.3 (3)	Naming convention is managed by content providers.
Y	Provide monthly reports	3.3.1.3 (4)	
Y	Secure access to the reports	3.3.1.3 (5)	
	Linking	3.3.2	
Y	Discovery Service does not discriminate among Content Providers contributing to the service.	3.3.2 (1)	
Y	Mechanisms are offered to enable libraries to establish preferences regarding which platforms to present to users as link targets, and in what order or priority.	3.3.2 (2)	
Y	Discovery Service confirms non-bias with regard to content indexed and results presented to the user. A statement in this regard is published annually.	3.3.2 (3)	
Y	Discovery Service uses an algorithm that is non-preferential with regard to the Content Provider for generating result sets, relevance rankings, and link order.	3.3.2 (4)	
P	Link presentation associated with a given result is configurable by libraries.	3.3.2 (5)	
Y	A seamless link (not necessarily a full-text link) is provided from the discovery	3.3.2 (6)	

	screen(s) to the A&I interface(s) utilized in the Discovery Service index.		
Y	Information about link behavior changes is sent to content providers and libraries when materials changes that could impact the result set, relevance rankings, or link order of results.	3.3.2 (7)	
	File formats and methods of transfer	3.3.3	
Y	Provides description of capabilities, limitations, and preferences regarding how content providers should transfer data to them for the most effective indexing by the discovery service.	3.3.3 (1)	
Y	Communicates to content providers when format, schema, or transport mechanisms will have an impact on features or performance of the discovery service.	3.3.3 (2)	
Y	Uses mutually agreed-upon robust metadata encoding schemas.	3.3.3 (3)	
Y	Uses mutually agreed-upon method and schedule for delivery of metadata.	3.3.3 (4)	
Y	Discovery Service provides COUNTER-compliant usage reports on schedule to all content providers	3.3.4.1.1	OCLC supplies data to Google Analytics for access via individual library Google Analytics subscriptions.
Y	Discovery Services includes a referrer URL identifying the discovery service when linking to content platforms or link resolvers.	3.3.4.1.2	OCLC supplies data to Google Analytics for access via individual library Google Analytics subscriptions.
Y	Discovery Service provides usage metrics to libraries.	3.3.4.2	
Y	Report on total number of searches per month.	3.3.4.2 (1)	
Y	Report on total number of unique visitors per month.	3.3.4.2 (2)	
Y	Report on total number of click-throughs per month.	3.3.4.2 (3)	

Y	Report on top 500 search queries for the last period.	3.3.4.2 (4)	OCLC supplies data to Google Analytics for access via individual library Google Analytics subscriptions.
Y	Report on top 100 referring URLs to the Discovery Service for the last period.	3.3.4.2 (5)	OCLC supplies data to Google Analytics for access via individual library Google Analytics subscriptions.
P	Discovery Service displays the access and license indicator for all content to which it has been applied	3.3.5	This metadata is not currently provided by content providers in the NISO Free to Read/Free to Use format. Where OCLC can identify OA content, we identify it through OA collections, links, and filters.
Y	Discovery Service provides mechanism to only allow certain databases to be searchable by authenticated users.	3.3.6 (1)	
Y	Discovery Service takes measures to ensure that certain databases are only activated by mutual subscribers if desired by the content provider.	3.3.6 (2)	
N/A	Discovery Service alternative coverage lists clearly indicate the metadata fields indexed are alternatives to specialized data, and note potential differences in quality, depth, and currency.	3.3.7	Service surfaces data provided by content providers. OCLC does not publish alternative coverage lists.
Y	Discovery Service should be able to exclude records from merged or grouped records if desired by the content provider.	3.3.8 (1)	Duplicate articles across content providers are clustered together. Institution can choose which databases are included in the cluster through database selections and can choose to turn clustering off.
P	Discovery Service should be able to display the source provider of the record and their logo.	3.3.8 (2)	Item details descriptions display source provider.

Y	Records in Discovery Service should include a link back to the source provider's platform if supplied by the provider.	3.3.8 (3)	
Y	Discovery Service makes available documentation that describes how metadata is generally utilized within the relevance algorithm and how it enhances discoverability.	3.3.9	
Y	Discovery Service Provider provides clear channels for reporting support issues	3.3.11	

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